BOARD BASICS

BOARD LEADERSHIP

New Trustee Orientation

A Guide for Public Colleges and Universities

By Richard T. Ingram

AGB

ASSOCIATION OF GOVERNING BOARDS OF UNIVERSITIES AND COLLEGES

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The *Board Basics Series* is intended to strengthen the effectiveness of governing boards and trustees by providing information about board roles and responsibilities. This series of publications is intended to inform debate and discussion, not to represent or imply endorsement by the association or its members. Additional copies are available by calling the AGB Publications Department at 800/356-6317.

New Trustee Orientation

A Guide for Public Colleges and Universities

A well-planned, well-executed orientation program can make an enormous difference to a new trustee or regent's future commitment and contribution to the institution. Orientation events not only carry enormous symbolic value, they also have the potential to convey a strong first impression of just how much the chief executive and board leaders value new colleagues.

A poorly designed or disappointing orientation program, by contrast, can foster negative impressions and inhibit the subsequent contributions of newly appointed or elected board members. The only thing worse than offering no orientation is to offer a poorly conceived or half-heartedly conducted program. Inevitably, an orientation program is only as good as the amount of time invested in its design and conduct, but it is important enough to be worth the time and effort even for only one or two new board members.

Trusteeship of public higher education systems differs from oversight of single campuses in some obvious and some subtler ways that should be accommodated in orientation programs for members of their boards. Components of a system range from as few as two institutions to at times well over a hundred. Student enrollments are apt to exceed those of single institutions, with the largest systems enrolling hundreds of thousands of students. Thus, one of the greatest challenges facing system trustees is that they often work at a greater distance from the academic enterprise than their single-institution counterparts.

As individuals, trustees have no legal authority or standing—and no special prerogatives. Only the full board holds the authority to serve the public interest as a bridge to and buffer between elected political leaders and government.

A guiding perception for public trusteeship is that trustees are not—and should not think of themselves as—"public officials." Rather, they are stewards of institutional assets on behalf of the general public. As individuals, trustees have no legal authority or standing—and no special prerogatives. Only the full board holds the authority to serve the public interest as a bridge to and buffer between elected political leaders and government. It is important to convey this as part of an orientation that distinguishes governance from management, calls for balance between the exercise of accountability within and advocacy on behalf of the academic enterprise, and aims to reduce ambiguity about the expectations for public trusteeship and board service.

Many new-trustee orientations simply are unsatisfying to their intended beneficiaries and disappointing for those who plan and lead them, though this need not be the case. Typically, such programs depend too much on presentation rather than discussion and lean too much on staff rather than on board leader participation. The presumption is that these are one-shot events to be respectfully endured, rather than a sequence of highly focused and stimulating sessions over a period of time.

The Necessary Building Blocks

At some institutions, a board member's initial term begins with clear expectations provided by a board leader (or the chief executive—the president or chancellor) at the time of the appointment or election. Far too often, however, institutions fail to convey performance expectations clearly to potential trustees.

Some institutions have designated a sophisticated staff member in the president's office to assist with the planning and conduct of orientation programs, but this is not always the case. (The alternative is usually for the president to carry the ball.) In many institutions, chief executives place a high priority on trustee orientation, but in some they do not. These and other aspects of institutional and board cultures will largely affect program design and conduct.

Those who design orientation programs must cope with the reality that boards occupy various places on the continuum of their development and effectiveness. For example, some boards have adopted formal statements of board member responsibilities or other codes of conduct for their members. Depending on a board's degree of sophistication, orientations can begin in very different places than with boards that have yet to do these things. An institution that has clarified what is expected of individual trustees in a written policy statement will have a much easier time with this component than will an institution that has yet to do so. It is much easier to have a specific document available to refer to rather than just abstract concepts.

The board chair and chief executive are the two leadership constants in these events, but fortunate institutions also have at least one or two individuals within the faculty, alumni, or administration who are articulate about institutional history and traditions and who can tell interesting stories and anecdotes about the good and bad times of decades past. Every college or university needs a historian or a storyteller to take a prominent part in the program.

The bottom line: Whatever the circumstances of the institution, system governing board, or presidential posture concerning how much time and energy should be invested in orientation programs, the challenge is to choose and propose the best available options to accomplish the greatest good. The goal is to seek balance between providing too much hand-holding and offering too little information. As with everything else in academic trusteeship, good judgment should prevail. Leadership is key to a successful orientation program, even if it is "behind the scenes" more than "on stage." New trustees are willing to engage much more enthusiastically in the orientation process than one might think—especially if the program is intellectually stimulating and provides them with a clear sense of their importance to the institution.

Guidelines for Successful Orientation Programs

What are the elements of a successful orientation program for new trustees? The following will be helpful:

Scope. All new trustees deserve the best exposure to the mission and purposes of the institution, to the board's characteristics and work, and to their individual responsibilities. No trustees should be given short shrift in their initiation and education.

Expectations. It is a mistake to assume that every new trustee is familiar with the governing board's corporate responsibilities or the board's expectations for the individual trustee's performance. Even those who are corporate directors or members of other nonprofit boards have much to learn about these matters. Besides, discussion of these "job descriptions" makes for stimulating and motivating experiences that can pay dividends in trustee commitment for the long haul. If expectations of individual trustees were not made plain at the time a trustee was recruited, now is the time for clarification.

Agenda. The agenda for the program should be highly participatory and offered in at least two sessions (but not more than three) over 12 to 18 months. Appropriate reading materials—but not too much—should be provided in advance. If reading is assigned, the specific materials should be used or referred to in the sessions.

Program. The program should not feel "rushed," nor should it be overprogrammed. Once participants sense that asking questions and making comments and observations truly are welcomed, the process is virtually assured to achieve its goals. It is not necessary to program every minute; leave time for reflection and free-ranging discussion.

Staff participation. Emphasis should be on discussion and engagement—not on presentation. This process is not about the presenters or their need to demonstrate how knowledgeable they are—it is about the new board member! It is also about the institution or the system, about the responsibilities of trusteeship, and about helping the new board member conclude that he or she made the right decision to join the board. It is essential to involve other trustees, staff members, alumni association leaders, and faculty and student leaders and to make it clear that their duty is to draw out and engage the new trustees, not to talk at them.

The 50-50 Rule. Regardless of the program's length, about 50 percent of the time should be focused on the institution and 50 percent on the board—its membership, structure, and work—and on board and trustee responsibilities. Observing the 50-50 rule will create a balance of content and help program planners avoid the temptation to spend too much time orienting new trustees to the institution at the expense of the responsibilities of trusteeship.

Assessment. Participants should be asked for a candid assessment of the program—verbally and informally in the closing moments of each session and more formally a few weeks later. The formal assessment should ask the trustee to reflect on the experience by responding to a few questions in a two-page written survey that can be mailed back to the central office (see Post-Orientation Survey, pages 17-18).

IT IS A MISTAKE TO ASSUME THAT EVERY NEW TRUSTEE IS FAMILIAR WITH THE GOVERNING BOARD'S CORPORATE RESPONSIBILITIES OR THE BOARD'S EXPECTATIONS FOR THE INDIVIDUAL TRUSTEE'S PERFORMANCE.

Setting and Accommodating Goals

It probably already is apparent that a couple of hours devoted to orientation to both the institution and to trusteeship are inadequate. An appropriate (but often neglected) place to begin is to set explicit goals for the orientation and then to design a program that devotes adequate time to achieve them. It is preferable to design a process that encompasses two sessions held at two different times, ideally within the first year of a new trustee's service.

Orientation to the Institution
In the orientation to the institution, these three goals may be appropriate or easily adjusted to accommodate the uniqueness of the institution or system of institutions:

- **Help new trustees appreciate the institution's, or system's mission, traditions, values, and history and take the first steps toward developing a personal connection with the institution.** The overall sense to convey is that the new trustee has assumed important stewardship responsibilities. All trustees, even those who are alumni, will benefit from an effective exchange with someone who can articulate the institution's major achievements, its trials, and its striking personalities.

  Key Questions: How can the orientation instill pride, connection, and commitment in a new trustee in light of the institution's unique history? How can each new trustee's background and apparent interests tie into the institution's programs and people?

- **Help new trustees quickly master and convey their knowledge of the institution's vital features and statistics.** A trustee who is comfortable with the institution's mission and demographics is more likely to be a devoted trustee. Helping a new trustee confidently deliver his or her own brief "elevator speech" to the curious person who asks about the enterprise is a worthy goal.

  In addition, a one-page executive summary that includes an excerpt from the mission statement, numbers of students by category, some budget information, graduation rates, names of major academic programs, current tuition and fees, faculty statistics by category, and other pertinent information will be an enormous help to the new trustee.

  Key Question: How can we efficiently and effectively convey basic institutional characteristics and achievements to new trustees?

- **Familiarize new trustees with the institution's challenges, strengths, needs, and priorities.** The typical organizational elements should be addressed: finances; enrollment management; academics; staffing patterns; key academic, student, and staff leaders; and physical plant needs. A campus tour that shows new trustees at least one building of every major type and introduces key individuals in their own work places is worthwhile. For public system trustees with more than two or three universities or campuses, a substitute for a tour of each campus might include a full description or slide show that profiles their missions, characteristics, and demographics. In addition, orientation leaders should be sure to learn each new trustee's interests, talents, and passions to ensure that the program enables the trustee to connect with one or two institutional offerings.

  Key Question: How can we help new trustees understand the institution's major strengths and needs—its priorities, opportunities, key competitors, and its strategic challenges in the marketplace?

Orientation to Trusteeship
For orienting new trustees to the responsibilities and practices of trusteeship, the following three goals are illustrative:

- **Provide new trustees with unambiguous information on the board's responsibilities as well as those of individual trustees.** This is easier if the board has adopted a clear job description (preferably appended to the bylaws), a statement of individual trustee responsibilities (expectations that include annual-giving guidelines), a compendium of board policies, and a list or brochure with trustee biographies and photographs. All documents, including the board's bylaws, should be reviewed briefly as part of the orientation process. One or two of AGB's publications (see Resources, page 19) may be assigned in advance as well.

  Key Questions: How can we make the board's functions and style clear for new trustees? For example, is the board's style informal—with emphasis on achieving consensus rather than formal voting on many issues—or is it more formal? If there is heavy reliance on *Robert's Rules of Order*, for example, a copy of this document should be provided along with an explanation of the board's rules and the state's laws concerning the conduct of open meetings.

- **Help new trustees see how they can contribute to the board's work.** Here's where new trustees can hear examples of initiative and creativity on the part of their colleagues. This also is an opportunity to review the board's committee structure and to gain a sense of what would be the most appropriate initial committee assignments for each new board member given his or her background and interests. It also is a good time to review the overall makeup of the board's membership, including backgrounds, occupations, alumni status, and other personal and career information.

Key Question: How can we efficiently integrate new trustees into the existing committee and board structures?

- Give new trustees ample opportunity to ask questions about anything bearing on the trusteeship. Questions that should be anticipated include: Is there an expectation of a personal annual contribution to the institution's or system's foundation? What is the average trustee gift? What are some campus activities between regular board meetings in which trustees are strongly urged to participate? Are trustees expected to attend graduation ceremonies and other events on campus?

Key Question: How can we effectively demonstrate to new trustees that what they do for the institution between board meetings often is as important as their participation in committee and board meetings?

Program Format and Leadership

A sound orientation program is best designed in at least two separate parts—one devoted exclusively to orientation to trusteeship, the other to the institution. The better part of one day for each session is about right and could precede or immediately follow the new trustee's first or second board meeting. Conducting the program before a board meeting is probably better to avoid fatigue following regular board business.

Session One

Orientation to trusteeship requires the leadership of the board chair (or vice chair). At least two of the board's key leaders should be major participants. Although the chief executive should be present, he or she should defer to seasoned board leaders in this part of the program.

Appropriate materials for this session (bylaws, minutes of the preceding board meeting, any statements bearing on trustee responsibilities and codes of conduct, conflict-of-interest and disclosure policies, trustee biographies, names of standing committees and their memberships) should be provided well in advance of the meeting, along with an appropriate reading from AGB.

Three hours should be more than enough time for a wide-ranging discussion. After lunch, the first of two campus (or institutional) tours should include brief visits to the offices of key staff and academic and student leaders, with the second tour following the second orientation session six months later. The size of the campus or system, naturally, will have a bearing on the scope and scale of the tours. In addition to the activities recommended earlier for new trustees of individual campuses, system trustees should plan to visit as many constituent campuses as possible early in their tenure.

A SOUND ORIENTATION PROGRAM IS BEST DESIGNED IN AT LEAST TWO SEPARATE PARTS—ONE DEVOTED EXCLUSIVELY TO ORIENTATION TO TRUSTEESHIP, THE OTHER TO THE INSTITUTION.

Session Two

The second part of orientation should cover the institution. Topics to include are the mission, major academic programs, institutional finances (revenue and expenditure trends, review of the last audit, indebtedness, and endowment), staffing structure, alumni and development programs, enrollment-management strategies, faculty organization and current participation in governance, student affairs, and physical plant strengths and needs. There are others, of course. Depending on the institution's complexity, a third session may be needed to cover all the bases (perhaps three to six months later). Although rarely needed, a third session can be devoted largely to programs or topics that new board members asked to learn more about.

There should be appropriate advance reading consisting of executive summaries on such topics as enrollment trends and student characteristics, and revenue and expense trends, but be careful not to overdo it. Inundating new trustees with too much information virtually guarantees it will not be read.

The more opportunity that new trustees have to meet faculty and students, the better. After all, they are the heart of the institution. It is a good idea to devote the first hour of the second orientation session to trustees' reflections and impressions on their initial board meetings (any surprises or suggestions?) and on what they gained—or failed to gain—from the sessions.

Unlike the first session orienting new trustees to the responsibilities of trusteeship, orientation to the institution requires the president or chancellor to be front and center. Ideally, at least one seasoned trustee should be present for at least part of the session. To keep everyone attentive and focused, the session should include brief presentations followed by discussions with two or three senior academic and business officers, coupled with visits to the offices of others as part of the second campus tour.

UNLIKE THE FIRST SESSION ORIENTING NEW TRUSTEES TO THE RESPONSIBILITIES OF TRUSTEESHIP, ORIENTATION TO THE INSTITUTION REQUIRES THE PRESIDENT OR CHANCELLOR TO BE FRONT AND CENTER.

System Trustees

System trustees face three special challenges. Because they oversee multiple institutions with large numbers of students, they often work at a greater distance from the academic enterprise than their single-institution counterparts. Their work is complicated by the reality that in many respects they serve simultaneously as trustees for the entire system and for individual institutions. Finally, system trustees often are responsible for resolving conflicts among regions (as well as institutions) over missions, program franchises, and resources.

In light of these realities, orientation for system trustees should include these features:

- Review of the laws and regulations that define the board's authority. This process helps new trustees appreciate the extent of their authority with respect to that of the constituent campuses on the one hand and the governor, the legislature, and government agencies on the other.
- Discussion of the political context in which the board operates. Because trustees must balance the pressures from campuses that seek more resources and programs with the desires of political leaders who hope to restrain spending (except for campuses in their home districts or for their cherished priorities!), board members need to be familiar with their state's political landscape.
- Introduction to the public agenda that the board professes to pursue in serving the state. This agenda may reside in several documents, but essentially it provides the rationale for the system and its mission, outlines the fundamental principles under which it operates, and offers a vision for the future.

Typical Questions From New Trustees

Anticipated questions should be built into the program design. If new board members don't ask the kind of questions listed below, they should! Again, a considerable amount of time in the program should be allowed for a free exchange with new trustees.

Questions About Trusteeship

With regard to trusteeship and what is expected of all trustees, here are illustrative questions—some of which may not be easy to answer.

- Is this board really engaged in the institution's issues and opportunities, or is it mostly window dressing?
- How much money do you expect me to give annually? What is the range and average giving of the other trustees? No one told me when I accepted nomination that I would be expected to set an example in personal philanthropy! Isn't that why we have a foundation board at this university?
- If we have a foundation, what is its relationship with the governing board? What is its mission?
- What percentage of our alumni gives an annual gift? What are our trends?
- Does the board rely on its executive committee to carry most of the board's responsibilities? What are the executive committee's responsibilities between board meetings? How many times during the year does the committee meet (compared with the board)? Do all board members get copies of the committee's meeting minutes?

- What issues drive our board meeting agendas? Are the agendas driven by committee and staff reports or by strategic and planning issues?
- Do trustees periodically have opportunities to meet with faculty and students?

Questions About the Institution
With regard to the institution, here are some questions to expect:

- For the president or chancellor: What is your vision for the institution's or system's future?
- What are the biggest challenges or threats confronting the institution or the higher education system?
- Who are our main competitors, and where do we stand with them?
- What are the university's most significant advantages over our competition? Which of our major academic programs are the most effective and noteworthy? Why? What are our weakest academic offerings? Why?
- What is the graduation rate for students in general and for student-athletes (average and by major sport)?
- Is our student financial-aid strategy predominantly merit-based or need-based? What are the trends in this area? Pros and cons?
- How does the board deal with assessing institutional quality and performance?
- What is the state of maintenance of our physical plant?
- How do we deal with matters of faculty prerogative and governance?
- What is our policy on substance abuse on campus? Is it effective?

Closing Reminders

Orientation programs for new trustees should be open to all board members. Occasionally, veteran board members will wish to participate, if only out of curiosity and perhaps to "renew their own vows." The more who choose to do so, of course, the better!

It is a good idea to assign each new board member to an appropriate and respected veteran board member as a "mentor" for perhaps one year. The new trustee and the veteran should be compatible in any number of ways (personal styles, experiential backgrounds, interests, or an alumni connection). The mentor should be present for at least the trusteeship segment of the orientation and should sit with the new trustee at board meetings. It also is good form for the mentor to call the new trustee befo and following each board meeting to see if any topic needs interpretatior or explanation.

In summary, a successful orientation features, at minimum, a two-par program that emphasizes:

- More discussion than presentation.
- Two campus or institutional tours (each combined with meeting key leaders on their own turf).
- Advance readings—all of which should be referred to in the program, even if only briefly.
- Trustee leader presence and participation.
- A stimulating, motivating presentation on the institution's history and evolution with anecdotes about personalities and key events.
- Limited but mixed presentation techniques and media.
- Presentations and discussions that take place in different venues.
- Fun and candid exchanges. Never miss an opportunity to highlight successes and major concerns.
- Informal and formal evaluation. A few minutes should be reserved at the close of each session for candid assessments of the experience. Ho can we do better next time? What was the highlight of the program? What was most valuable and useful? What are your impressions of our last board meeting? Are there any surprises or suggestions concerning how we do the board's business? Finally, within a couple of weeks after the orientation session, send a two-page evaluation survey.

Creating and sustaining outstanding orientation programs is a challenge for most institutions. Enormous effort necessarily goes into preparing and conducting programs that are worthwhile and consequential. The foregoing suggestions will help the reader design and execute more effective new-trustee orientation programs—whether for one trustee or for ten.

Responsibilities of the Governing Board

Legislation that sets the responsibilities of public institution and system governing boards typically does not reflect the full range of contemporary expectations and sometimes confuses management with governing functions. To help reduce confusion and ambiguity, it is good practice to include in board bylaws a contemporary "job description" that explains board responsibilities. The following is a generally accepted list of responsibilities that can be adapted to fit the institutional or multicampus settings.

- Approve (determine, reaffirm, or change) the institution's statement of mission after consultation with appropriate internal and external constituencies.
- Appoint, support, assess the performance of, and terminate (if necessary) the chief executive (president or chancellor).
- Approve and periodically review the appropriateness and consequences of all major institutional policies. These include decisions concerning the addition or discontinuation of major academic programs and major services consistent with the institution's mission and financial capacity.
- Ensure that good planning is done periodically by management and faculty, participate in the process, assess the quality of the outcomes, approve final plans, and monitor progress against goals.
- Fulfill fiduciary responsibilities by approving and monitoring the annual budget, protecting the institution's financial and capital assets, ensuring responsible and prudent investment of all restricted and unrestricted funds, and ensuring a competent and comprehensive annual audit process.
- Ensure adequate resources and their effective management. This includes setting a good collective example in personal philanthropy commensurate with personal means and otherwise serving as advocates for institutional needs with external constituencies.
- Interpret the institution to the public and defend the institution, when necessary, from inappropriate intrusion. Conversely, the board also helps interpret society's needs and expectations for the institution's faculty and management. It serves as both a buffer and a bridge.
- Ensure that the board's reputation is exemplary in the course of meeting its responsibilities. By keeping its own house in order, the board contributes to the institution's reputation and standing.
- Ensure that the institution serves as a good citizen in its relationships with other social, educational, and business enterprises through appropriate collaborations and partnerships.
- Assess the board's performance periodically through an appropriate process that helps ensure objectivity and that includes a follow-up action agenda.

Responsibilities of Individual Trustees

All higher education boards should adopt their own standards of conduct to clarify the expectations their members hold for one another. This can be accomplished by agreeing on the substance of a generic trustee job description. This helps prospective trustees understand the obligations of the position. The following list can be adapted and expanded, but it is a place to start.

Individual trustees are responsible for...

- Having the time and energy necessary to faithfully and diligently prepare for and participate in the board's meetings. This includes certain ceremonial and special meetings that require the trustee's presence between regular board meetings. Trustees are expected to devote approximately ___ hours each year to their responsibilities (or the equivalent of __ days).
- Believing in the institution's mission and responsibilities to serve the diverse society that supports and depends on it.
- Asking substantive and timely questions of management and colleague board members in the course of committee and board meetings.
- Speaking candidly, but also being willing to support decisions and policies approved by the board's majority—even if the trustee did not vote for them. Only the collective board has legal authority; individual trustees have none. In a similar vein, trustees should avoid asking the administration for special favors. Although trustees are afforded respect and occasional expressions of appreciation for their volunteer and philanthropic service, they are due no special prerogatives.
- Remembering that only the board chair speaks for the board and ordinarily is presumed to be delegated the responsibility to address controversial issues or board decisions with the media. In a similar vein, the chief executive ordinarily speaks for the institution. Individual trustees should not presume to speak for the board or the institution.
- Avoiding personal agendas or being seen as a representative of any internal or external constituency, special-interest group or cause, community, or specific part of the institution. All trustees have a responsibility to use their best judgment and conscience in the interests of the institution as a whole. "Single issue" trustees are ineffective trustees.

- Supporting the chief executive while at the same time exercising critical judgment as an active, discerning, energetic, and probing trustee. Board members should be able to distinguish between management and governance issues.
- Communicating any significant concern or complaint promptly to the chief executive. Trustees should be mindful of protocols and procedures for handling of such matters (ordinarily at the lowest appropriate levels of administration). Substantive matters that may affect the chief executive should be called to the board chair's attention.
- Respecting the opinions of others and refraining from public criticism of them or their views. At the same time, individual trustees should contribute to a trust relationship among board members and should help the board to "keep its house in order."
- Avoiding any possibility of even the perception of a possible conflict of interest with their financial, personal, and family interests. Trustees should inform the board chair and chief executive promptly of any such possibility. Early disclosure is essential.
- Defending the institution's and the board's autonomy while working with other trustees to provide accountability and advocacy in equal measure.

Post-Orientation Survey

[Name of Institution]

Thank you for participating in our effort to provide you with an orientation to your responsibilities as a trustee of ______. Now that you have had some time to reflect on your experiences, will you please take a few minutes to respond candidly to these questions and return this survey to __________ in the envelope provided?

We take seriously our responsibility to ensure your trusteeship is fulfilling and worthy of your time and generosity. Your comments and suggestions will help us offer and sustain effective orientations to future new board members. Thank you!

1. What did you find to be the most interesting and useful part(s) of your orientation?
2. What feature should be improved or discontinued (and why)?
3. With regard to our effort to orient you to the board's responsibilities and your own responsibilities as a trustee, how would you rate it overall?

   ☐ Outstanding ☐ Good ☐ Adequate ☐ Poor
4. How can that part of the orientation be strengthened?
5. With regard to our effort to orient you to the institution, how would you rate it overall?

   ☐ Outstanding ☐ Good ☐ Adequate ☐ Poor
6. How can that part of the orientation be strengthened?
7. Do you feel you have a clear understanding of __________'s mission and what makes it unique among our competitors?
8. Do you have a clear understanding of our major strengths and achievements as an institution?
9. Do you have a clear understanding of our major challenges, needs, and priorities?

10. Have you had a good introduction to some of the key leaders and their responsibilities?

11. Was the discussion of the institution's history, stories, and traditions interesting and helpful?

12. How would you rate the campus tours?

☐ Very worthwhile ☐ Worthwhile ☐ Not worthwhile

13. How would you rate the time you had with faculty and student leaders?

☐ Very worthwhile ☐ Worthwhile ☐ Not worthwhile

14. How would you rate the quality of the materials provided in advance of the orientation sessions?

☐ Very helpful ☐ Helpful ☐ Not helpful

15. What kind of information or advance readings should we consider adding or deleting from next year's orientation program?

Please offer any other comments and suggestions that can help us strengthen our new-trustee orientation program.

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Name *(please print)* Date

Resources

Those responsible for helping design and conduct orientation programs for new trustees will find literature on governing board and trustee responsibilities available from several sources. The aim should be to provide something that is not too lengthy, yet for it to be substantive and conducive to shaping discussion. From AGB's portfolio, any of these titles can be considered. (For additional AGB publications, please visit *www.agb.org* or call 800/356-6317 for a copy of our publications catalogue. AGB members are entitled to bulk discounts.).

"Board Basics: The Fundamentals." (Seven booklets for public institutions and systems.) AGB, 2003.

"Board Performance and Effectiveness." *Trusteeship Portfolio.* AGB, 2003.

"Board Basics: Effective Committees." (Ten booklets.) AGB, 2003.

Bridging the Gap Between State Government and Public Higher Education. Center for Public Higher Education Trusteeship and Governance, 1998. Includes a separate executive summary.

"Governance of Public Higher Education." *Trusteeship Portfolio.* AGB, 2003.

Ingram, Richard T. *Effective Trusteeship: A Guide for Board Members of Public Colleges and Universities.* AGB, 1996, rev. 2003.

Ingram, Richard T. "Trustee Responsibilities: A Basic Guide for Governing Boards of Public Institutions." A "Board Basics" booklet; also available as an audiotape. AGB, 1997.